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ABSTRACT

The United States Education Information Network (USEIN) is conceived by the National Library of Education (NLE) as a network or consortium of organizations interested in collaborating to improve the coordination of domestic U.S. education information. The Kick-Off Conference, summarized here, was intended to solicit ideas concerning the structure, membership, and operations of USEIN. The conference was attended by approximately 100 invited representatives from the educational community, the library community, education-related professional associations and private industry groups, and relevant Government agencies and their contractors. Participants were asked to work together to derive tangible outcomes and produce an agenda for USEIN development. They were also asked to consider how to effectively collaborate to improve existing information dissemination and to identify information gaps needing to be filled. Discussion papers were commissioned from five authors: Jo Ann Carr, Jon D'Amicantonio, Patricia Libutti, Donald Ely, and Nancy O'Brien. Each conference session included the presentation of a commissioned paper, participant questions and comments, and breakout group discussions. Day one was organized into two sessions under the respective headings: "Moving USEIN From Vision to Practice" and "How USEIN Can Ensure Excellence, Access, and Equity in Services." Day two was organized into two sessions under the respective headings: "How To Make USEIN Functional: Developing an Action Plan" and "Common Threads and Next Steps." Also presented on day two were: "A Helpful Discussion of USEIN", by Toni Powell, and "The NLE Perspective", by Blane Dessy. (In post-conference planning activities, NLE expressed the intent to change the USEIN name so as to avoid confusion with the "U.S. Network for Education Information" (USNEI), formed for similar purposes at the international level.) (SWC)

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USEIN Kick-off Conference

*United States Education Information Network
National Library of Education
Gallaudet University Kellogg Conference Center*

November 13-14, 1997

DRAFT TEXT

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DAY 1: OPENING REMARKS

Welcome and Meeting Objectives

—Blane Dessy, Executive Director, National Library of Education; and
Jane Kolbe, Chair, Access for All Task Force

Ms. Kolbe opened the meeting by welcoming participants and noting how the meeting reflected one of the recommendations of the Access for All Task Force. She hoped the meeting would generate good outcomes and move the task force's goals forward.

Blane Dessy, executive director of the National Library of Education (NLE) added his welcome and those of Richard Riley, Secretary of the U.S. Department of Education (DoED) and the acting Assistant Secretary, all of whom believe in the power of collaboration, outreach, and consultation with clients. Mr. Dessy provided a history of NLE's formation and the origin of this meeting. He credited the National Agricultural Library (NAL), the U.S. National Agricultural Information Network (USAIN), and the University of Kentucky's agricultural library as providing good models for NLE. The following paragraphs summarize the main points of Mr. Dessy's discussion:

NLE History. Created in 1994, NLE had several charges:

- to be a repository for Education information in the United States;
- to serve as a "one-stop" reference service for a variety of users; and
- to promote greater cooperation and resource-sharing among providers, using

technology to build links to the network of national education resources—necessitating a real team-building, collaborative agenda.

Wide spectrum of participants. Mr. Dessy noted the wide variety of conference attendees, who included representatives from labs, centers, the publishing industry, information technology specialties, foundations, professional associations, education, the communications industry, a variety of research and information services, and public, state, and academic libraries. All have a vested interest in education information and are at some level "in the same business." All are trying to improve American education at some point, continued Mr. Dessy, and so bring their combined resources to bear on creating as meaningful and useful a system as possible.

Tangible outcomes wanted. Participants were asked to work together to derive tangible outcomes. Mr. Dessy asked for "synergy" from the group in order to produce an agenda for disseminating education information. Conference attendees were asked to consider how to effectively collaborate to improve what is already out there and to identify ways to address gaps in education information. He noted that this was more than a matter of technology, that it also involved the preservation and digitization of historic materials as part of a gamut of issues ranging from traditional to modern.

Five papers commissioned. Five papers commissioned by NLE to help guide its approach presented thoughtful suggestions and outlined several possible strategic directions. The papers

were in draft form, and participants were asked to provide input to the authors, whose final products were to be widely distributed.

Author's Opening Remarks

—*Jo Ann Carr, Jon D'Amicantonio, Patricia Libutti, Donald Ely, and Nancy O'Brien*

Jo Ann Carr, Director, Instructional Materials Center, University of Wisconsin-Madison School of Education, said she was excited about this meeting's potential for obtaining the collective input of unique client groups and expertise. She felt that the United States Education Information Network (USEIN) should reflect the following:

- The diversity of the American education audience. Services of the education information world can match the pervasive diversity found throughout American education.
- The consumer focus of deliverers, entrepreneurs, and developers of education information.
- A view of the world wide web and information channels as both a medium and a process, relative to technology.
- A view of information as more than a commodity. Ms. Carr highlighted the need to find the best way to develop knowledge as a basis of informed decision-making and educator staff development.
- A view of USEIN as an expansive agency of change that must be inclusive and constructive.

Jon D'Amicantonio, Associate Librarian, California State University, felt the meeting participants could have a big impact on the future of education information access and distribution. The challenge, he stressed, would be to include those not in the "technological loop." To illustrate, he told a story about a librarian who resisted putting in a telephone because she "had no use for that new technology."

Patricia Libutti, Education Subject Specialist at Quinn Library, Lincoln Center, Fordham University Libraries, addressed the theoretical end in her paper, while raising some of the same issues as the other authors. She said we need to know what makes an organization work, to understand what must happen after the enthusiasm takes hold. The need exists to develop a wide variety of social user networks for USEIN.

Donald Ely, Senior Associate for Educational Technology, ERIC Clearinghouse on Information and Technology, was visionary in his outlook. He used an analogy of designing and constructing a home, with the staff of NLE serving as the "architects." The role of conference participants, then, could be to serve as advisers or consultants to the architects. This role demands asking many questions, he continued, questions that are targeted and intelligent, to elicit answers that will allow the most effective use of the technology already accessible. "If technology is the answer," quoted Mr. Ely, "then what was the question?" One important question is to decide how to use the existing technology, not to create more. He asked

participants to "dream a bit," encouraging them to ask the questions that will further the design of a great house able to meet the needs of its inhabitants.

Nancy O'Brien, Head, Education and Social Science Library, University of Illinois at Urbana-Champaign, called herself the "pragmatic one." Her desire: to bring this network into existence, so that it is useful to all and widely accessible. This goal requires input, she said, from the diverse conference audience.

SESSION I: MOVING USEIN FROM VISION TO PRACTICE

Plenary with Authors

—Moderator: Jane Kolbe; Authors: Patricia Libutti and Jo Ann Carr

Patricia Libutti

Ms. Libutti began, noting that the two papers featured in this section concern mainly (1) who we are as a constituency and (2) what methods, structures, etc., must be put in place for these broad constituencies to relate to each other. The issue, she continued, is one of collaboration and partnership, words that mean something different now than they did 15 years ago in the library/business world. Now, collaboration must be viewed in terms of a continuum, with cooperation at one end and partnership at the other. Cooperation does not produce changes in social structures, as people work in parallel to achieve goals. Next is collaboration, which does produce organizational and structural change. Finally, there is partnership, which Ms. Libutti called the most intense and influential kind of social organization and one that can be either casual or formal. Partnership means "definite change" in the two or more interacting groups.

Jo Ann Carr

Ms. Carr noted that while the agricultural network provides a good model for NLE, major differences exist in that an educational information network must bridge the lifelong span of participation by its constituency, who have broadly diverse needs. Ms. Carr summarized these needs according to three types of libraries serving important roles and offering services at several different education levels.

School libraries. Ninety-seven (97) percent of schools have libraries, with larger schools tending to have larger libraries. But size does not influence the presence of key components such as training and staffing levels, a factor to figure prominently when considering the role of school libraries in USEIN design. Ms. Carr stressed the need to look also at the role of private schools, where religious affiliation has an impact on library availability. The network capacities of these libraries must be identified.

Public libraries. USEIN designers must consider how public libraries interact with adults and children and what the services are. Services to schools are not as pervasive in this setting. Resources must be strongly considered and more participation with schools encouraged.

Academic libraries. These libraries have huge client groups to consider. Education and curriculum libraries must be examined in depth. Inherent characteristics include geographic distribution differences, with teacher education more heavily concentrated in the Midwest and education "players" more heavily concentrated in private and smaller colleges. This situation demands that an education network consider how to work through agencies where one individual may be serving the needs of many educators-in-training (e.g., one person manning a curriculum center).

K-12. This group represents over 44 million students in over 86,000 schools. Considerations include school staffing levels, which are often small in comparison to the populations served. USEIN must accommodate this situation to be useful.

Colleges and universities. Over 2 million students are in education; seven percent of these are in schools of education. The school population demographic is much different from that of the mostly white/Anglo faculty being trained to work with it. This fact must be taken into account when designing USEIN.

Professional associations. Of more than 6,000 organizations, 300 are focused on the elementary level and 1,500 on higher education. USEIN must look at the role associations might serve in reaching individuals who currently do not actively participate in a professional association.

Other. The participation of publishers and producers in this network requires an examination of roles to determine where they are parallel with and different from those of professional organizations.

Different levels for different partners. The education information network under consideration is diverse in terms of client groups and levels of participation and involvement available for individuals. An important group not reflected among conference participants, noted Ms. Carr, is the consumer. Participants must consider how to involve these end users, as they will be integral pieces in the delivery of educational information.

Patricia Libutti

Ms. Libutti's paper depicts a "hub" for educational information, with several different spokes going out to different users, such as K-12 school, library, academic (higher education), etc. She said a "spoke" is needed to connect with the commercial sectors, that the construction of educational web sites involves linking with the appropriate nonprofit commercial groups. Further, general public representation must also be considered, as much of what the education world does is reviewed, discussed, and publicized in public arenas. This circumstance must be considered as enthusiasm is generated for USEIN, and key tasks (indicated in the "hub" graphic—Libutti, p. 20) must be performed to reach these groups.

Two contingencies. Participatory partnerships involve both users and contributors. Users may include representatives of the diverse USEIN users, who can serve an advisory or evaluative role, offering recommendations on how to improve the network. Contributors could include providers of information deemed relevant for USEIN linkage, with a likely task being the provision of information necessary for linkage or pointer.

Invisible partners. So-called "invisible" partners must be made partners in reality.

Jo Ann Carr

Returning to Mr. Ely's architect metaphor, Ms. Carr said the task of constructing USEIN could be viewed as constructing a log cabin, with the USEIN piece integral to growing the cabin into a wonderful, blended estate.

The approach taken, she continued, must be supportive of the BHAG, or "big, hairy, audacious goal, to support the vision for the future. If what is being constructed now will be an integral part of the ultimate product, then it must address different levels of partnership, cooperation, and collaboration within a diverse and pervasive client and partnership group.

Participant Questions and Comments

Participants had the following questions and comments following the author's panel presentation (Q=question; C=comment; R=response)

C. The public library serves children mainly in individual, not connected, settings, which is how electronic assistance is offered as well. This is something to consider when designing USEIN.

C. USEIN needs to consider, too, the potential impact on home schooling of children. The public library provides needed support for this education option. USEIN must be accessible to those who conduct information searches in less sophisticated ways.

C. Only 35 to 38 percent of public libraries have public youth librarians and media centers. Rural public libraries are deprived and getting worse. Library science education in university schools of education is less attentive than it should be to youth and school library services, and schools are not graduating enough people to fix the problem. Schools of education are terrible about giving instruction on how to teach students and assist youth. Someone must educate people to educate people.

Q. What is your definition of education information, the market, and the secondary market? We as participants in this process need guidance on the ultimate goal of this network. Is it intended mainly for use by information professionals or end users, or the entire range of students and other potential users that have been outlined here?

R. [Pat Libutti]: It may cover a variety of formats, but education information means anything that nurtures the education needs of students. This definition covers a huge tract of ground, but as we must deal with this broad definition as we tackle this "beast."

R. [John D'Amicantonio]: I like to think of this as a customer-based product. And certainly there is a lot of information that falls under the rubric of education information. USEIN must include and reflect that broad range.

C. We need to focus on problems that USEIN can solve. For example, USEIN probably cannot solve the low numbers of library professionals, but it can, in a distributed mode, help improve or update the content that stimulates students at all levels—which should be its primary focus.

C. In an effort to be inclusive, there has been a sacrifice of focus. We must know who can expect what: students, parents, educators, schools, and libraries. We must get decisive about what we can do for each group, or our recommendations will be nebulous.

R. [Blane Dessy]: We can talk about an ideal focus in the small groups. Contribute your perceptions, as we want a shared goal. I do not wish to color or influence your perceptions, and ask that you decide the level of focus needed.

Breakout Group Reports

Blue Group

The Blue Group's discussion was wide-ranging, vague, and broad, yet thorough. The group saw the customer as the whole universe, but tried to narrow content. The following highlights emerged from the discussion.

- USEIN should be higher in the hierarchy than NLE.
- USEIN could be a gateway.
- We must change the thinking toward technology information.
- Information could be layered in a useful manner.
- Designers should take advantage of what is already out there, adding intelligence and creativity to better use and access it.
- The focus should be on the "what," not the "who," on both a fee and free basis.
- "Go where the puck *is going* to be."
- User feedback is needed.
- NLE should facilitate collaboration among partners and with users. "Participant" might work better than "partner."
- There are many security issues to consider.
- An automated tickler file of questions could be incorporated to answer users' frequently asked questions automatically.

Session I: BLUE Flipcharts

What are educational information resources?

Focus defined — focus needed

"meta-site:"

1. Provision of electronic documents. USEIN becomes entry point (free and fee)
2. Human links
3. Maximize users

4. Facilitate collaboration
5. Levels of participation

National database of FAQ's

Green Group

Describing its discussion as a "stream-of-consciousness" exercise, the Green Group generated the following points for consideration.

- *Who* the audience is must be determined, with care taken not to exclude important groups, but to target post-secondary constituents as the primary audience.
- The *Access for All* report contains a good mission statement and discussion of audience for NLE.
- NLE and USEIN were viewed as the same—that is, as the core of this information clearinghouse.
- The same audiences were seen for USEIN as for ERIC.
- ERIC and NLE have some of the same "magic words." The main difference is that USEIN seeks to build on ERIC and other organizations' current efforts to produce an expanded and better ERIC. There is also a potential role for a national-level capability that transcends state boundaries.
- On the "parent" issue, a National Parent Information Network already exists. The core issue is "What will USEIN do that is different; what don't people know that they need to know?" Marketing, then, becomes a big issue.
- Added to the four "A's" should be aggregation and analysis.
- How would one determine or identify gaps and develop solutions? What is the Federal role, and how can one lead in to partnerships and contracts? This question calls for consideration of offering incentives, developing standards, or creating the hybrid library, with both traditional and high-tech offerings. Other potential considerations include contracted agreements with private industry for products and services, establishment of clearinghouses, and the need for private-sector involvement. Federal versus private-sector involvement is a distinction worth considering.
- Another factor is people resources—how can they be linked and what is their willingness?
- Priorities must be established to help planners "get their arms around" this big idea.

Session I: GREEN Flipcharts

SCOPE

ERIC as model.

Task force mission

Information professionals

- Post secondary students
- Teachers*
- Teachers of teachers
- Researchers
- Information service providers
- Parents

Not targeted: Students, PK-12

Locus: Education-related information centers

To do:

- Find out what seekers want
- Focus groups
- Find out what is being done to serve needs
- Identify what needs doing
- Design

Design principles: 4 A's plus aggregation

To keep in mind:

- Central directory – clearinghouse function
- Federal role
- Substantive needs
- Process/access needs
- Protocols
- Real network experiences
- Incentives
- Negotiating cooperation

*May include home schooling parents

Yellow Group

The Yellow Group confessed it came up with more questions than answers. These are summarized below.

- What is USEIN supposed to be and where is it going? Work must be done to bring all the various databases together.
- Maybe USEIN should be called a *provider* network.
- Again, regarding duplication, what is already out there must be the focus.
- We need to establish finite projects on which we can work and succeed.
- What is USEIN's role? A situation analysis is needed.
- Where there are gaps, and should USEIN fill them?

Session I YELLOW Flipcharts

Identify and establish priorities for customers.

Technology literacy issue.

Who do we serve? Be as broad as possible. Customers of all ages.

Start with one market. What will that be?

For strategic purposes there is a need to establish priorities: what are criteria?

Develop a better idea of the intended audience.

What is USEIN? What is it meant to be?

What is the role of the regional to USEIN?

What is the optimal use? What is our vision?

* Access to what end.

Role in facilitating knowledge development access is not a well defined term – causing use to be widespread.

Development in real world – ride wave vs. control something.

*What do we have now? Where are we going? What educational information is available where? Example: labs, centers, ERIC, Eisenhower Clearing House, NLE

How are we really working now? There is a need to identify parts.

What is education? It depends upon what people need to learn about.

Maybe we should focus on U.S.E.D. and other federal agencies.

Need to know what is available.

What do we have to offer and to whom.

Serve research community best – researchers know what they want and how to get it.

Parents need information. Don't know what they need.

*USEIN bypasses the information provider – maybe need U.S. information providers' network. Who provides what for whom so as to not duplicate each other. Focus on provisions rather than consumerism for development of the system, staff, etc.

Need analysis of information service providers.

*If USEIN is the answer, what is the problem?

*What is the niche of the network?

*What does it mean to cooperate?

*Establish standards and guidelines for information sharing and access?

*Establish finite projects that can successfully be done.

What is the role of USEIN in the federal government's strategic plan?

Search engines cannot pull information up by categories. Teachers are needed for this.

*Where are we now – tie that together – what is the big picture?

*Gaps – duplication. If there are gaps should USEIN try to fill the gap?

Partnerships in technology require a different way of thinking: what is commonality among partners? Make sure the right person gets that information.

Structured way of acquiring information – approach could be centralized/distributed. Look at how people ask questions, not just what they are looking for, to make searching for information easier.

Can we analyze how people search for information?

People want the object itself, not to know that something merely exists.

** Will USEIN become the controller/provider of standards?

** Will USEIN become recognized as the neutral form for standards and tools that will benefit education providers and consumers?

Establish access guidance.

Standards and tools will be guided unerringly by technology.

Technology issues discussed are timely – de facto standards using a common set of protocols equals what USEIN could do.

Session I: YELLOW (SUMMARY SET) Flipcharts

Establish priorities for customers.

Issue of technology literature.

Customers of all ages – NLE.

Start with one market

*What is USEIN – access to what end?

What do we have now? Where are we going? What educational information is available?
Where?

(Concern)

USEIN bypasses information providers. Should we call it USEIProvider Network?

Who provides what for whom so we don't duplicate each other.

Focus on providers rather than consumers for system and staff development.

Need analysis of information service providers (too large).

If USEIN is the answer ... what is the question?

What is the network's niche?

What does it mean to cooperate?

Establish standards and guidelines for information sharing and access?

****Establish finite projects that can successfully be done?**

Role of USEIN in the Department of Education's strategic plan?

(go back to *) Where are we now – situation analysis? What's the big picture?

ID gaps – if so, should USEIN fill them?

ID duplication.

Will USEIN become the controller/provider of standards?

Neutral forum for standards and tools to benefit education providers and consumers.

Technology issues.

Orange Group

The Orange Group also produced several questions, along with some recommendations.

- Who is the audience?
- How do we make sense of all this information? This question again raises the issue of access.
- NLE and USEIN are not tools for the schools. Teachers and educators should be the primary audience.
- USEIN must be clearly defined.
- A multitude of formats is needed for USEIN.
- NLE should serve as the "umbrella" for this information network. Redundancy?
- USEIN should be a mechanism for bringing partners together, with direction and need as considerations.

Session I: ORANGE Flipcharts

Audience (customers): –who is the audience?

- "Front line" educators: administrators, teachers, librarians, K-12, adults
- Parents
- Libraries (in cooperation) → problems: may not have "professional librarians"

How do we make sense out of all this information:

Access?

Community – what happens beyond school?

Secondary audience:

- Voters
- Local boards
- Policymakers

NLE and USEIN are not tools for the schools! (population).

The primary audience is our teacher educators.

Self-directed learning?

Day care educators should be included.

USEIN needs to be clearly defined.

Should we focus on content and service or connectivity and hardware?

The same information should be available in multiple formats.

USEIN provides the conduit for the information the NLE may provide.

The NLE is the conduit for bringing the USEIN content to potential users.

USEIN may be redundant!

USEIN should be the mechanism for bringing partners together.

“Direction and need” have to be considered.

Red Group

The Red Group also struggled with how to get their arms around this network idea. It looked at a connective structure from a variety of angles and models. Their ideas are summarized below.

- Regarding information access, who belongs? Children are learners and need to learn how to learn, after all.
- Dissemination should not be just a one-way mode.
- USEIN would generate the knowledge as well as provide ways of looking at it, facilitating a two-way contribution to the network.
- Archiving issues must be addressed.
- Standards and interoperability of system design must be taken into account.
- With regard to organization governance, change should be sought through a site-based management organization, where all here are part of the site.

Session I: RED Flipcharts

Access for All as guide for action.

Focus on agenda for meeting – beyond individual agendas.

Ready for change –

Example: Teachers become information providers for students.

Computer as library? NO.

Focus → Who is target market?
Education professional?

Education professional.

Focus on content, maybe?

Digital library – format dictates difference, change, not constancy.

Library → complex organism.

Our discussion → the structure, connective ... how does this happen in the national library we are discussing?

For what purpose? See *Access* documents – mission and goals.

What is the focus?

Information about education –

Look at examples → medicine, agriculture

Education → what to do to provide structure/cooperation ...

Connective structure:

1. Information access
2. Information dissemination
3. Knowledge generation
4. Evaluation/review – digital allows depth in this area
5. Marketing/awareness
6. Education
7. Organization of "stuff"

Metadata

8. Archiving
9. How knowledge is organized and represented to be relevant ... context selection
10. System design/standards for inter-operability and connectivity

Metadata (?)

11. Organization to facilitate serendipity
12. Knowledge generation – facilitate two way communication – new potential for everyone as publisher/writer – collaboration – chat rooms, document sharing
13. Governance – policy, setting of objectives
14. User/information seeker – to accommodate different “levels” of users → sophisticated, new, etc.
15. Role – importance of human intermediary – both broker and source

How are partnerships formed? Identification of models.
Olle/cc's Am. Memory

Direction Sought for Breakout Sessions

Before breaking, participants requested more definitive direction from the conference organizers. They suggested that they be given a specific question to tackle in the breakout sessions, along with specific relevant tasks to address. They generally desired some basis of consensus, i.e., an identification of issues cutting across the various groups, to more quickly arrive at convergent thinking. Another disagreed with this approach, warning that too many issues had yet to be explored. Others felt the agenda did not sufficiently reflect the range of topics in the papers, such as networking between various types of organizations, forming strategic alliances with the private sector, or devising approaches to work projects.

To address these concerns, Mr. Dessy asked that participants note additional issues they wished to explore as part of the next day's agenda.

SESSION II: HOW USEIN CAN ENSURE EXCELLENCE, ACCESS, AND EQUITY IN SERVICES

Plenary with Authors

—Moderator: Eleanor Jo Rodger; Authors: Donald Ely and John D'Amicantonio

In introducing the authors, moderator Eleanor Jo Rodger said they would "bring us the forest's glory" behind the issues of access and equity.

John D'Amicantonio

Mr. D'Amicantonio began by saying that even though attitudes are changing in the right direction regarding access and equity, there is still a significant group who are not part of the information highway, who are not computer literate, and who are not in the loop at all. He noted that information access is a real challenge for certain such groups, particularly those who are not computer literate. Persons with disabilities, the homeless, elderly, and rural poor, along with ethnic minorities, are not part of the information superhighway, which continues to be dominated by white males, the most *included* group. Many people in a number of sectors are not information literate.

His objective in his paper was to identify such underserved groups and outline solutions. He noted several worthwhile efforts under way, along with several related gaps that still exist:

- Public libraries are reaching out to underserved populations, providing good models and serving as good potential partners for this effort. But while the many library services and information networks are making important strides, they are not yet inclusive.
- Many traditionally disadvantaged groups are becoming more "connected," yet still lag behind. Students in inner-city schools and girls in general are not being trained to use networks and have not acquired computer literacy skills.
- The role of library media specialists is growing in importance. However, funding is frequently not available to support this important position in the schools. This is a big problem. Are the students attending these schools coming out with the information they need? How will they even know how to access USEIN?

Participant Questions and Comments

C. We must use caution in relying on the big library networks as potential USEIN partners or models, because they have other interests that may compromise their usefulness.

C. I see a great need for user information along educational, cultural, and geographic lines. Perhaps surveys or other instruments could be used to discover the information needed in particular areas and by populations with which we may not be familiar. In other words, look at user groups farther "upstream" to see how they are getting information now.

R. [Mr. D'Amicantonio]: There are some positive strategies taking place that encourage growing use by ethnic minorities.

C. There are a plethora of computer access programs to examine as potential models, some of which reside in the Federal Government, e.g., HUD.

C. Your paper does not reflect how the needs of underserved populations, particularly minority populations, are not being met with regard to their level of access to the network. Your paper should address this issue from the "needs" and not the blame aspect.

R. [Mr. D'Amicantonio]: Issues of equity exist for those in rural as well as inner-city areas.

C. Access and equity must also take into account access to the technology itself. It also must deal with generational disenfranchisement.

C. I would like to see more research studies to document the points in your paper. The gender issue, for example, is beginning to change a bit. Your paper could benefit from the inclusion of more modern studies.

C. Equity must be perceived as the ability to tap into complex data systems (as demonstrated in the lunch presentation). The bottom line is access, which means making the complex attainable.

Donald Ely

Mr. Ely called the issues surrounding access a systemic problem whose various pieces will eventually come together. He advocated redefining library as a function, not a place. He noted the emergence of a hybrid library system, or a combination of traditional and high-tech offerings, adding that it is not necessary to move immediately to the digital library.

He felt the issue of information quality had not been adequately addressed, nor the changing role of the information specialist, who would become more like an "information navigator." However, the issues of which populations should be served and the definition of educational information were fairly well in hand.

ERIC is at the core of this revisioned network, Mr. Ely continued, together with other concepts like the virtual reference desk, 800-numbers, and e-mail. The question is one of organization. Although everything is there technology-wise to see the system through the next several months, several related issues must be discussed and decided as deal with—

- filters;
- alternative access;
- national union catalog implications;
- metadata formats;
- nonprint media and multimedia resources;
- full-text access;
- digital copyright procedures;
- security versus access; and
- paying for information (free or low-cost).

Mr. Ely asked participants to consider the phases needed to see forward progress and how long it would take. He suggested adding two more "A's" to NLE's four goals: Assistance (how to impart new skills to users) and Accountability (what are the internal agendas of our partners?).

Participant Questions and Comments

C. Full text on ERIC is hindered by a lack of funds. The market will not pay enough to justify this investment. Where is the funding going to come from to help us achieve our goals—the Federal Government, USEIN, grants, X? More money could accomplish so much more. USEIN should not have to depend on the vagaries of whatever Administration is in power.

R. [Mr. Ely]: What about exploring alternatives to lower the dollar requirement?

C. What about USEIN linking with the organizations that are putting out the documents and letting that organization be responsible for providing full-text versions of them, with USEIN acting as the gateway.

R. [Mr. Ely]: That is too simple (facetiously).

C. ERIC has not had the advocacy effort behind it, as have other organizational initiatives. We need to use our collective representational strength to be stronger advocates. To make another point, digital + libraries + users should be the proper equation for the new paradigm we are helping to shape. This arena is not just a computer science one.

C. Little mention has been made of universal service funds. USEIN could help libraries and schools across the country shake loose funds for systems, given that \$2.5 billion is available.

R. People are doing what is necessary to comply with those service fund requirements, but they will merely address the "pipes," not the infrastructure-building that must occur on top of that, such as for training, etc.

Assignment for Breakouts

Mr. Dessy gave participants two questions to consider as they adjourned into breakout sessions: (1) Should our efforts go more toward helping those from a technical services angle, or helping those who do not have access? and (2) What new electronic products or service enhancements should be made available in terms of increasing electronic access?

Breakout Group Reports

Blue Group

The Blue Group addressed the equity versus efficiency question, calling it a moot question if the legislative language mandates that access be provided for all. Their discussion points are summarized below.

- The equity issue. The group felt that the NLE decision-making process was not addressing the lack of dual-gender representation and ethnic diversity, and that this is a big concern.
- Content of materials. Library and other collections should be inclusive with regard to gender and ethnicity.
- Incentives. If NLE is to be collaborative in its approach, participants must have incentives so that their particular involvement engenders enlightened self-interest.
- Reinventing the wheel. It is not necessary or productive to supplant established procedures that have been proven effective with new ones, e.g., training.

SESSION II: BLUE Flipcharts

Should we: tech/equity

- Easy mandate and morally YES
- What does the federal government do?
 - Electronic and multiple formats.
 - Phone companies – model-fed assistance.
- Who
 - Labs
 - Direct contact with multiple formats
 - Federal assistance

Which – Equity (expand)

- Limited funds.
- What is representation? What are gaps?
- How can we fill gaps?
- Aggregate other functions of other information providers and provide gateway.
- Training to refer other training assistance.

Creative

- Include international, star schools

Creative expansion of creativity

- Ed yahoo
- Paid/volunteer/perks
- Tremendous imbalance of information – never at no cost
- Mutually beneficial
 - Value added as member
 - Marketing

- Higher visibility
- Database expanded
- New standard
- Sharing of information – both gain
- Yahoo – USEIN
 - Needs Dewey decimal system
 - Searchable engines around easy-to-find information
 - Just bringing database together won't be enough
 - Training everyone to do research/retrieval
 - Different modes of training

Products/Service

- Look to models.
- There are existing services – let USEIN be switching point for customers
 - Questions
 - Files
 - Referral
- Partners – what's in it for partners?
- Customers need our partners because of richer resources (perk for partner)

*Access is the issue to bring information to everyone.

- NLE will provide access.
- NLE will provide perk to partner.

Green Group

The Green Group shared the following overarching ideas from its discussion:

- Equity is not about people having technology, it is about having the skills to use it.
- Ensuring equal access is an appropriate use of technology.
- Expanded access creates more demand for information and shifts costs.
- A needed federal role would be to educate state and local entities about library value added.
- Technology *versus* access/equity may be a misnomer, as both can occur simultaneously. Equity must be part of the foundation.
- As technology becomes more complex, we must change the way we serve our constituency or customer base, providing greater synthesis and analysis services.
- We must translate research into user models and develop synthesis.
- What is the ultimate good that can come from this technology? Are we improving teaching and learning, etc.?

Session II: GREEN Flipcharts

Access and Equity

1. Technology as a storage medium to ensure access.
2. Compatible, multiple formats.
3. Technology creates more demand for user services.
4. Need for more analysis and synthesis.
5. "Filtering"
6. Awareness
 - Importance of "value-added"
7. Innovation and equity.
8. Technology in schools – students having access.
9. Equity as a major philosophical issue.
10. Information continuum – participants have different roles.
11. Complete directory of education information service providers.
12. National union catalog ...

Sustainability

Yellow Group

The Yellow Group suggested a focus on mid-range technology to bring as much information as possible to as large a group as possible in as many formats as possible. Other recommendations are given below:

- The emphasis should be on the electronic versions of materials.
- There should be a quality assurance system that is part of all the information mounted; sites should be validated in terms of quality.
- Regarding search engines, a natural rather than controlled language capability should dominate, to avoid the user having to first find the valid search words before conducting the search—which would be the case if USEIN mounted a subject-specific vocabulary.
- Interactive software for AI is project-based?

Session II: YELLOW Flipcharts

Focus on mid – low technology.

Content with multiple access points.

Customer driven.

Electronic and referred (?).

Products: a quality assurance system

Contributor accountability

USEIN seal of approval



Products

Search engine (subject specific)

Filters

Document sharing

Interactive software for AI/knowledge based systems

Orange Group

The group rephrased the first of Mr. Dessy's starter questions to be the following: "Should efforts be technology-based, or should USEIN attempt to serve those with limited access? The group attempted to answer the question by first noting NLE's strengths, to include—

- The ability to provide policy materials.
- Connections with many educational entities, which creates good networking opportunities.
- NLE's connections creates opportunities to enlist informational and educational structures. Well-developed library networks are needed in all states.

Other discussion points included the following:

- Output could be technology-based; input could be any form.
- How can we build on what states are already doing?
- Quality control would become an important component.
- Could we impress decision-makers by using them as a pilot group to deliver customized information?

Session II: ORANGE Flipcharts

Access issue (first question) must address entire range of users.

Do we provide different ways to provide information or only through the network?

Public library often is a major access point for teachers (may not be).

*Existing multi-type network that USEIN can build on.

*Focus new energy on electronic meta-site, cooperating with state and local libraries, schools — reach individual level school.

***NLE strengths:**

- Policy materials

- Connections with a variety of institutions identifying best resources at state and local levels

ERIC = still paper-based input.

Yahoo, etc. don't index everything that is on the web.

USEIN should develop a model to provide lesson plans and compensate teachers for work.

*See what state education departments are doing to provide information to schools – i.e., technology-based networks.

*Should make ERIC better and digital.

The question of property rights needs to be addressed.

Capturing information in multimedia format; problem in capturing this is changing technology.

*Output – technology-based input – any format.

*USEIN = quality control and provides contributing directions to access.

Need to conform to standards to make product available – need to identify acceptable standards existing elsewhere (state of the art).

*Delivery = technology based.

USEIN will facilitate – umbrella organization – to link resources.

Products

*Explore fundamental uses of push technology to provide information on a regular basis – old SDI approach – prototype to test with existing decision-makers.

Pushing information we already have, i.e., ERIC.

*Look at existing projects – information producing products, especially; then fill the gaps.
Could start with public policy or other content area.

Red Group

Calling its discussion "dramatic," the Red Group made the following points:

- A technological approach should be used to achieve equity and access.
- USEIN will be "any-stop" shopping to the end user.
- Quality control and repackaging of information for other providers were additional topics.

Session II: RED Flipcharts

Technology

- Differentiated access – USEIN vs. NLE.
 - Technology as an approach to serving information needs is a primary emphasis.
 - Equity and access are primary service goals.
 - Achieving cooperation – incentives.
 - "Any-stop shopping".
 - Selective information guidance – "narrow casting".
 - Providers as customers.
 - Expectations
 - Needs
 - Standards
 - Repackaging both for USEIN and customers
-

DAY 2: ASSIGNMENT OF DIRECTIVES

At the start of Day 2 of the conference, Mr. Dessy responded to participants' request for more definitive guidance by assigning them directives to cover in the breakout sessions. Preceding this discussion, however, was a presentation by Toni Powell, president of the U.S. Agricultural Information Network, Agriculture Library at the University of Kentucky. She shared her lessons learned and offered recommendations to USEIN designers.

A Helpful Discussion of USAIN

Toni Powell, President, USAIN, Agriculture Library, University of Kentucky

What is USAIN? Ms. Powell began her presentation by answering this question. She said USAIN was a network of people whose interest is agricultural information. Its formation echoes recommendation #12 in the *Access for All* report:

The National Library of Education should have a permanent advisory body, including representatives of the U.S. Education Information Network, customers, peer national libraries, the U.S. Department of Education, and other federal agencies involved in education services, and state and local education and information agencies. This body should work in liaison with other national educational advisory groups, such as:

- *U.S. National Commission on Libraries and Information Science (NCLIS)*
- *Federal Library and Information Center Committee (FLICC)*
- *National Educational Research Policy and Priorities Board (NERPPB)*

USAIN is not part of the National Agricultural Library (NAL), continued Ms. Powell, but rather is a self-funded group whose members are "shapers of information." They are trying to provide equitable access to information by all groups who need it. They have progressed through the "storming and forming" stages and are now entering the "norming" stage.

USAIN genesis and structure. Ms. Powell said USAIN was the brainchild of Joel Howard. His idea was to recruit people of influence to support NAL, targeting those in the land grant network initially, along with many others, some of whom were unprepared to assume roles as elected board members. Board positions require much volunteer time and presented a hardship for members who already had demanding regular jobs.

USAIN uses a committee structure and also includes loosely organized interest groups with the flexibility to focus on specific topics of interest. This feature of having informal groups to explore certain topics was requested by the membership itself, a request that USAIN was able to accommodate.

USAIN membership dues are \$250 for an institution. Although having no paid staff is a definite problem, USAIN has been able to focus on many different areas, holding national conferences, with international participation, to explore various informational issues, such as those that relate to rural, electronic, and preservation of agricultural literature. The latter was the topic of a 1991

conference at which participants crafted a "preservation vision" that was formally ratified in 1993. Needing resources to carry out this preservation initiative, USAIN hired a consultant to apply for grant money. With the \$900,000 grant it received, the USAIN preservation project is going forward in five states. USAIN has also funded other projects related to its preservation plan, and is currently partnering with Cornell University, as it has in the past.

All considered, continued Ms. Powell, USAIN can boast quite a few accomplishments, even with its limited manpower and resources. But it wasn't always that way. Following a period of relative inactivity—and after it had been in existence for 5 years—a USAIN planning conference was held, similar to the present USEIN conference. The main purpose of the conference was to bring people together to shape the network's future direction. A hired facilitator worked the issues, but the conference results got filed away. USAIN eventually was "reborn" and was formally authorized.

Guiding principles. To survive, any organization must be amenable to change. In USAIN's case, several basic issues had to be decided, which offer guidance for an approach to USEIN.

- Why do we exist? USAIN organizers had to define their audience. Who could benefit from this information network? As an advocacy group, USAIN had to broaden its membership to be more inclusive.
- Partnering with other organizations is a must, but only if the relationship is mutually beneficial.
- USAIN responded to NAL direction and leadership.
- It is important to keep the membership informed and to craft a business plan.

Action plan. USAIN crafted an action agenda, based on several items, such as surveys, past conference results, TQM ideas, and public feedback obtained through the Internet. Regarding USAIN's action plan, Ms. Powell said "if we couldn't articulate it, we didn't do it." She said many people are currently working on tasks related to implementing the USAIN action plan.

One operational aspect of USAIN is that it does not compete with the local public library, which is part of its primary constituency. They are not replacing the library or extension specialist, etc., but rather seek to complement or support them. "We really do believe that we must be shapers of public policy," explained Ms. Powell. (She added that Chuck McClure (sp?) is very articulate on this topic.) USAIN has a valuable and particular role to play, which is to watch legislation, communicate what is happening, and tell people how to get their opinions heard. USAIN is not a lobbying group, but supports NAL and serves as its customer base. USAIN can give NAL constructive customer feedback to help NAL effectively grow and develop.

Lessons learned. Ms. Powell shared the following "lessons learned" from the USAIN experience:

- You must have a clear vision; but that vision can be changed.
- You need a structure in place for administrative continuity. "Grunt work" makes things happen.

- You must communicate with your membership.
- Don't reinvent the wheel.
- Don't step on toes; avoid unnecessary competition.
- Forge lasting, mutually beneficial partnerships. AGNIC, or the Agriculture Network Information Center, could be a good potential partner for USEIN.

Pamela Andre—AGNIC

Agriculture is a very broad discipline area, Ms. Andre explained, and AGNIC has a functioning web page that is linked to over 700 web sites. It is well used. For over 5 years, AGNIC has been honed and refined into what its shapers wanted it to be, with key resources identified. Librarianship skills, as applied to paper collections, are also needed to organize electronic resources. (AGNIC's web site is www.agnic.org.) AGNIC is taking advantage of a distributed network to provide access to information in a manner most advantageous to users. Designers are trying to capitalize on what institutions are already doing, bringing them under this umbrella to allow users to conduct many different kinds of research and to find additional resources via "hot links." AGNIC is really growing. By collaborating and developing partnerships, this information network can provide a greater good to the agriculture community.

Participant Questions and Comments

Ms. Powell answered several audience questions following her discussion.

Q. How many members does USAIN have?

R. We have 150 members. Membership is low because of the fallow years. USAIN has published a networking guide and other outreach materials to raise awareness and membership.

Q. Is membership composed of individuals or institutions?

R. Mainly individuals; institutional members number fewer than 10.

Q. What is USAIN's main purpose?

R. To serve in an advocacy role for agricultural information. Its major function is advocacy, not service provision.

Q. It sounds like you defined how all the various pieces had to work together before you could develop an effective organizational structure.

R. Yes, you need to define your related groups.

The NLE Perspective

Blane Dessy, Executive Director, National Library of Education

Before beginning the final author plenary, Mr. Dessy wanted to weigh in on USEIN and how he envisions this network. He began by explaining that when NLE was created, it searched for a model to increase cooperation and resource sharing, as it was mandated to do. He likes the agricultural model because of the forum established for bringing people together. However, USEIN's mandate is different. When asked whether he is envisioning USEIN to be like USAIN or AGNIC, Mr. Dessy responded "a combination of both."

NLE operates like any other library that already exists, he explained, with many resources and services, and similar issues to face. NLE also manages the contents of DoED's world wide web information. NLE's mandate further requires that it promote resource sharing and cooperation; hence USEIN was born, conceived as a collaborative organization facilitated by NLE that would aid its agenda by promoting education, addressing particular information tasks, and taking advice and direction from outside professionals (e.g., those gathered). So, USEIN is both different from and similar to NAL, AGNIC, USAIN, etc. NLE sees its role as a facilitative one, bringing people together to talk about the big issues—what can we do together better than we can individually? NLE is not an advocacy organization and does not want those it involves to be lobbyists.

By the end of the day, continued Mr. Dessy, we hope to have made progress toward the following:

- plans for an ongoing structure (e.g., annual meetings);
- identification of tangible projects; and
- advice for NLE staff as to what it should be doing.

Our goal is to develop an ongoing collaborative network that is working on important and specific projects. We intend to put NLE dollars toward this project so as to hold additional meetings, commission research, or conduct specific projects, etc. We will take advice from you on how to direct our resources.

Participant Questions and Comments

Mr. Dessy addressed several participant questions following his brief discussion.

Q. What is the nature of the federal role and support? Are there grants available?

R. Right now, those mechanisms do not exist, but we can build them into a budget request. We do not have to be bound by thinking that everything must be completely free all the time.

Q. My primary emphasis in participating with this initiative was to link with NLE electronically—Do you consider one of USEIN's roles to be to serve as a mechanism for organizations to share information electronically, to link in that way?

R. Yes, those are prominent issues. Technology is one big piece of all this; we can capitalize on members' technological and informational strengths for linking purposes.

C. We must do a lot of "imagining" to see this through and develop this potential. We must think cross-sector-wise. Coming together might help us to identify current gaps in available information out there. We must get beyond our institutional boundaries to do some national resource sharing. This effort has good partnership potential and presents a tremendous opportunity to help the government be its best and to move to a higher level of government functioning.

C. *Access for All* is excellent. We should look at the recommendations of the NLE Advisory Task Force and see with which ones we agree or disagree. Such a focus will more directly lead to implementing an organizational structure. We should have used *Access for All* as a starting point. We need to get to that next step of organizational structure and produce some action.

C. What is the role of the private sector?

R. The private sector is tremendously important, for it creates much of the primary materials we use in our libraries. It will help us to identify needed educational resources, as well as create, market, and distribute this information. For example, our legislation requires us to create indexes, guides, etc. I need help from publishers to do that. We need to meet with publishers by way of a task force to determine how to create needed educational resources and market them throughout the United States. We want first and foremost to meet the needs of educational consumers, and need publishers to be a part of this effort, understanding that they have their own interests and do not work for free.

SESSION III: HOW TO MAKE USEIN FUNCTIONAL: DEVELOPING AN ACTION PLAN

Plenary with Authors

—Moderator: John Collins; Author: Nancy O'Brien

Nancy O'Brien

Ms. O'Brien made five specific recommendations in her paper, as follows:

- Appoint a provisional working group to develop bylaws and operating procedures for USEIN.
- Create a list-serv to connect USEIN members.
- Develop a web page devoted to USEIN, with links to relevant resources and sites.
- Develop a master directory of education information and service providers.
- Identify and solicit partners to participate in USEIN.

Ms. O'Brien then identified five basic steps for implementing the network and her recommendations:

1. Identify key members/stakeholders, to include many people on an advisory task force. The task force would address
 - allocation of responsibility for various tasks, mainly to be done by NLE, but calling for collaborative efforts as well;
 - funding sources; and
 - the structure of the USEIN executive committee.
2. List-serv formation. This component could serve as a mechanism to answer questions, address issues, or discuss needed new products. Related issues include—
 - Who hosts or moderates the list-serv?
 - What are acceptable uses of the list-serv?
 - What are the criteria for subscribing to the list-serv?These issues are also best addressed through working groups.
3. Web page formation. This component is a central and critical one. The web page should offer some selectivity, provide an awareness of the network, and promote participation in it.
4. Creating a master directory of major and minor education information and service providers. Many layers of possibilities could apply here having to do with potential partners, potential sub-directories, and the devising of criteria for creating an information network. This recommendation also needs a specific task group to flesh out all the steps involved. The master directory should be available in both paper and electronic versions.
5. Develop partners for the network. This initiative needs to expand to non-included organizations. They can be solicited through ERIC, the web site, and additional conferences.

We need also to promote the benefits of partnership and to create policy guidelines for being a partner, i.e., what is required, what the responsibilities are, and how to withdraw as a partner.

Many issues must be addressed, Ms. O'Brien concluded, adding that a structure is needed first, along with issues to target. After these items are resolved, other things will fall into place. She asked for comment via her e-mail address.

Participant Questions and Comments

Ms. O'Brien responded to several participant questions following her discussion.

Q. Is your suggested master directory similar to the National Union Catalog espoused by Donald Ely?

R. Yes, they have the same intent. ERIC is actually closer to the purpose, but other resources need to be brought to bear, e.g., ALA (?) and other sources not included in ERIC directories. We must have an evolving, ongoing, and constantly changing updated directory for USEIN.

C. We must think about our obligations to our constituency target audience and narrow that range a bit.

R. I realize that it is not just about kids; that is my own personal bias.

Q. Do you agree there is little confusion as to who are the end users of USEIN and USAIN?

R. I am uncomfortable with the similarity of the two acronyms. How do others feel?

C. The similarity may be less important than the fact that the USEIN acronym—lacking the “ED” up front—does not convey that it is an educational network. It should “say” education in some way.

R. From a marketing standpoint, we need to change the name to “ED,” e.g., for cataloguing purposes—something the PTA will remember.

C. The recommendations in your paper look like “reinventing the wheel” in some aspects, e.g., a new web site. It is important instead to tie back into what already exists and evolve out into other areas. It is not a good idea to restart things; it is a waste of time and leads to redundant efforts and overload of options, with no value added. I urge you to consider ideas that evolve from what already exists.

C. To avoid the tyranny of participation, we must refine the level and degree of that participation, respecting the time commitments asked of people. To NLE: please do not ask people for what is not uniquely theirs to share, as that is a waste of time.

Q. Do you have any ideas for membership formation of the working group you are recommending?

R. I envision a group of about 8-16 people. What must be addressed is how to select people to make the policy and shape the new network. This group (conference participants) can help to identify key players and groups. I do not have *specific* recommendations in this regard, and, in my paper, turn everything over to NLE. You, however, can suggest key players.

C. What will be the expectations of this working group? We need to have a clearer expectation of members' roles and responsibilities.

C. The group could operate in a "post-it" fashion, with opportunities for members to provide input, give reactions, etc.

A. The recommended list-serv and web site offer a key posting place and give people a medium for providing feedback.

Breakout Group Reports

Orange Group

The Orange Group looked at NLE's mission statement (*Access for All*, p. 23) before examining a potential typology for a working group. The call for widespread access was a key factor. The group's recommendations follow:

- Establish a steering committee to serve in an advisory capacity to NLE. The steering committee's membership could include content and access providers, as well as end users. They could be charged with governance of the initiative and with setting up working groups, which would include NLE in an *ex-officio* capacity, with voting responsibility.
- Establish working groups, who could address these areas: the network's electronic configuration and linkages; the structure of participation by collaborators, partners, and international groups; and network development, to include issues of funding, advocacy, and making the case for NLE.
- Come up with a new name for the network.
- Examine expectations for NLE's potential products: web sites, which should be completed quickly and represent future-focused thinking; directories; and list-servs. The added value of a collaborative approach was discussed.

Session III: ORANGE Flipcharts

Working Group

1. Cross sectors.
2. P.T.A.? Yes — major stake holder/ No — needs rather than provider.

3. Primary audience? — content based: p. 23 research and other information relevant to
4. School librarian representative.
5. Content — providers (includes repositories) PLUS NLE.
Access-providers (ERIC)
End users/advocates
6. How to create an organizational structure.
7. Multiple working groups?
 - a. structure: steering committee
governance/policy
—how to involve all sectors — what groups are needed — see #5
 - b. program
 - c. configuration-electronic linkages
 - d. funding and involvement: private as well as public
 - e. — advocacy
 - e. — capacity-development

Expectations of Steering Committee

1. Agree with Nancy? Yes.
2. Hub web site → need soon! Single gateway.
3. Focus on "added value" of collaborative activity.
4. Advice to NLE.

Potential Network Names:

USEd NIC

USEd NIC

NEd (Information)

USEd

Red Group

The Red Group said that it revisited yesterday's discussion in a new context, having now "hooks to hang things on." It identified the following as high-priority recommendations for NLE.

- Move concepts to reality. The group agreed with much of what was in Ms. O'Brien's paper, although it did not see moving immediately to a web site.
- Establish and take responsibility for this network. NLE should indicate the direction it wants to travel and make this network its own.
- Address what is important for a national network to do, compared with what is already taking place at the state and local levels. USEIN must address the "synergistic" effect.
- Keep the provider and consumer ideas clear, but do not make separations along these lines, as "we are all both."
- Zero in on this network and consider economic feasibility to be an important aspect of determining what can be done.

Session III: RED Flipcharts

Need to get the word out as to what USEIN is – need publicity program to support USEIN – do from the beginning.

Incentives for participation – publicity can help do this.

If NLE gets more visible, more people will be interested in participating in USEIN.

*What do ultimate customers want from USEIN – don't just do another web site, etc. – do this before developing products.

*O'Brien's paper talked about moving from concept to reality. Need to make planning information public to create interest.

Publish timetable.

Participants in planning.

Disseminate information through more than list-serv.

Participants also are responsible and also should publicize.

Publicity will create interest.

Where dissemination should take place? (page 5 of Access for All) – Is list on page inclusive enough?

What priorities are needed in the task force?

Who are key players who could advance goals and vision?

Page 5 list needs to be refined based on expertise and skills required for working group and the key organizations that should be represented.

NLE responsible for establishing and promoting mission and goals of USEIN.

Suggest NLE identify who should influence planning for USEIN.

USEIN (part of mission) – promote cooperation and resource sharing.

*(See page 1 comment on customers and page 4 evaluation entry). USEIN vision needs to be shared and focused so it will be concrete.

Example: resource sharing = ILL systems. Provide unlimited and boundless access to information. – example: CIC (Biglo) Union catalog.

****What can be done nationally to promote regional and local cooperation?**

Access – facilitate for all people, regardless of affiliation.

*Scope is so huge – needs to be refined. NLE needs to put forth a refined vision.

Divide groups into information providers and information consumers.

*On the other hand do not distinguish between consumers and providers. Keep fluid so it will stimulate the generation of information.

USEIN needs to address what is cutting edge and will assist customers in problem solving.

Cannot separate linkages and content. This promotes one-stop shopping.

Distributed basis to develop hot topics for the general public.

Also great concern for serving professionals who, in turn, serve the general public.

*Need to recognize priorities = primary audience needs to be focused.

*Must consider economic feasibility.

"Directory" needs to be developed and kept up to date.

Need to look at politics of cooperation in getting the work done.

*Evaluation – consider from beginning. Consider first.

Yellow Group

The Yellow Group came up with a list of 10 major points (see flipchart page below). These are concrete tasks to be taken on by the "grunt group," i.e., what has to be done, paid for, solicited, and nurtured in organizations. A brief summary precedes the flipchart listing.

- List-serv issues for the work group. The group sees the list-serv as a means of communicating among people doing the job and those outside of that circle.
- The work—what and who? NLE should serve a facilitation/coordination role instead of a governance one. Staff and budget lines must be drawn and financial constraints provided by NLE. A work or advisory group could probably handle only five or six projects, which suggests a great need for focus and prioritization.

Session III: YELLOW Flipcharts

1. List-serv: need for more than one — for “working group” members, maybe non-permanent.
2. New projects being developed continuously.
3. “Working group” — develop organizational issues — recommend organizational policy.
4. What are membership criteria? — institutions only.
5. Core group of USEIN — different sectors have different roles.
6. *What* are we providing, not *who* are we serving.
7. Working group look at “evolving” and “enhancing” directories, web sites, etc.
8. “Bully pulpit” of NLE.
9. Focus groups/counsel to NLE.
10. Leveraging of resources — financial.

Potential network names:

EDWORLD
EDSMARTS
EDLINE
EDNET
EDUNET
EDANSWER
EDINFO
EDQUEST

Green Group

The Green Group generated questions about a potential working group:

- Should ERIC be the foundation? What about degradation?
- Who would answer these questions? Perhaps USEIN would not.

This group used graphical representations to explain the function of a working group.
Composition of the group could include the following:

- business and industry;
- education community;
- parent groups and organizations (including ERIC);
- library interests, through professional associations;
- agencies;
- standards and interoperability experts;
- policymakers; and
- DoED grantees, to name a few.

Session III: GREEN Flipcharts

Working Group

1. Business/industry — carries content.
2. Education committee (teachers, school librarians, administrators).
3. Parent groups (organizations).
4. ERIC.
5. Multiple library interests (professional associations).
6. Agencies (research and development → TAND = technical assistance and delivery, delivery) e.g., regional labs, etc.
7. Standards/interoperability expertise.
8. Policymaker (-s) state?
9. Grantees (U.S. DoED).

Making Plan Functional

- Q1. What is the function of this network? (An unanswered question)
Q2. Should ERIC be the foundation?
Q3. Who will define (answer these questions)? Could the answer be not to do it at all? (thru USEIN?)
Q4. Working group — Charge? Composition?

<Need to have trained information intermediaries in all schools>

Blue Group

The Blue Group addressed items they believed to be directed to follow-up work after the meeting, namely—

- The purpose of the working group;
- An advisory committee to keep it going;
- The importance of an organizational structure and bylaws;
- Oversight of a technological plan to attract and serve a broader group of people;
- Facilitation by technology of human interaction;
- Identification and recruitment of stakeholders in the process;
- The possibility of USEIN being the virtual library component of NLE, keeping what is good and growing it for the future;
- The need for broad participation in the working group, remembering that providers and consumers are often the same, and that a variety of groups would want to be involved, so different levels of participation should be offered; and finally
- "Why not just build on ERIC since we all like it so much."

Session III: BLUE Flipcharts

NLE = this project. (clearly linked ...)

USEIN = virtual library of NLE – a role NLE is already serving.

WORKING GROUP

(We like this concept ...)

and beyond – List-Serv – public among members

Who participates?

Participants, core contributors, beneficiaries

Teachers, et. al.

Parents

End-user consumers

Needs to provide different levels of participation.

Broad group – representing education information providers for special groups

To do what?

1. Set up advisory group.
2. Suggested (in function if not in federal fact) by laws, organizational structure.
3. Oversee development of technical plan to deliver this product ... (Yesterday's demo ... human component).
4. Plan to continue identifying and recruiting of stakeholders.

We have much to learn from ERIC – model/change that ...

SESSION IV: COMMON THREADS AND NEXT STEPS

For the final conference session, participants were asked to address four major issues related to USEIN implementation: equity, customer needs, education information, and management and role of NLE. Participants were asked to recommend and prioritize next steps for NLE action, and to recommend and prioritize methods and procedures for achieving these actions. Descriptions of the charges for each breakout category are provided below.

Equity: Assuming that the basic information storage and retrieval mechanisms are electronic, how can USEIN best ensure access and equity for all?

Customer needs: Assuming the target audience for USEIN is educators, parents, researchers, decision-makers, and students in the education and information services fields, what do we need to know concerning their current and future information needs and information-seeking behaviors?

Education information: How can USEIN best identify education information providers and the content and formats they offer? Based on these findings, how can USEIN identify information and services gaps, and address them?

Management and role of NLE: How can NLE best guide the development of USEIN in terms of (1) appropriate participants and/or contributors; (2) organizational form; (3) incentives; (4) technological standards; and (5) content quality assurance.

Breakout Group Reports

Equity/Red Group

The Red Group addressed the use of technology to achieve access. Highlights of its discussion follow.

- Criteria are needed to define underserved populations. Partnership is an important part of equity, so USEIN should keep this in mind when conducting outreach.
- NLE should leverage access/equity efforts with those already doing it.
- Processes are needed for identifying audiences and existing bottlenecks to access, conducting evaluation, carrying out education and outreach to create awareness and change agents to enlarge the access circle, and addressing marketplace globalization—which speaks to such issues as multi-lingual capacity and translation of documents.

Session IV: EQUITY/RED Flipcharts

Can technology solve access?

- If so, how?
- If not, when and how not and what else is needed?

Before technology:

Issues

- Who should be served?
- Who can be served?
- How and whom?
- Who determines content?

Answers

Focus groups
Marketing
Training
Product variety
Resource leveraging
Gift authority
Multiple points of intervention
Partnering
Representation

Customer Needs/Orange Group

The Orange Group recognized that the area of customer needs represents a big task. Highlights of its discussion follow.

- To understand customer needs, we must collect and quantify information. Leaders should be made members of focus groups to discover customer needs.
- Quick, simple, rapid delivery systems should be made available.
- Public libraries are important players.
- Cable and satellite delivery of services should be considered.
- Although it is not a realistic expectation to be able to reach into every home, intermediaries, such as public libraries could be used in this capacity.
- Gaps. Distance learning must be addressed, along with creating higher content expectations. Users are expecting full text and complete materials.
- Marketing. A new name for USEIN is needed, as is a master list of names and institutions.
- Uses of information. There must be a way to discover how end users feel, begging the need for an evaluative capability to get feedback.
- Search terms. Other environmental technologies could serve as possible models for using laymen terms or terms of art to enhance searchability.

Session IV: CUSTOMER NEEDS/ORANGE Flipcharts

Collection — How & What

- On line with fields
- Surveys (though massive); perhaps phone, not mail
- Focus groups (use existing networks for contacting people)
 - including telephone logs from ERIC
 - member organizations
 - balanced group reflective of user skill levels
 - fluid categories; user becomes provider

*How are users finding information now?

- Technology a first priority to benefit the greatest number of people with the greater access
 - current sources first

Delivery

- Quick and simple (web pages with text-only options)
- Full text, on-line with graphics*
- Public libraries important direct delivery agent
- Get stuff from cable companies, computer companies, software etc . . . education satellite
- Access to all in some place (community labs, school, public libraries)
- Access points — not necessarily in homes
- Use models that already exist — PBS
- Student involvement in technology maintenance (school work)

Other topics

- Use of information (student end use). Examples of information in action:
 - parent/student/teacher
- Depth of information
 - Abstract vs full text
 - What do people want?
 - Context of information. Just in time.
- Education of immediate retrieval (on-line help)

Gaps (framework)

- Knowledge
- Timeliness
- Media
- Access

Media

- Storage/hardware issues
- Video delivery gap (and do we even know it exists)
- What type/medium? — age level
- What is available?
 - Informing of resources through public libraries and schools
 - PTAs as a learning forum
 - OTAN as a delivery model for multiple delivery methods
- Descriptors
 - Which are best for users? What do they prefer/use? Hide the technology and make use interface less.

Current information-seeking behavior

- Depends on access ability
- This needs to be what people are getting, what they wish they could get, where they get what they want, what medium they want, what their expectations of a "good" system is.

Marketing/promotion \$

- Skywriting — slogans/mascot
- New name — posters
- Media coverage — in-flight radio magazine
- Get big guys in press to buy in and write about it.
- PSAs
- Membership lists of organizations — master list

Education Information/Yellow Group

To begin its discussion, the Yellow Group came up with two related questions: What is information, and who is the provider? They believed it helpful to have a typology to define the type of information out there and the providers of it. They developed a matrix to show delivery of information from and to providers (see chart below). To match providers to the matrix, it is necessary to identify the following: key players (survey would help), type of information they are providing, resources needed, and gaps (EROD might help here).

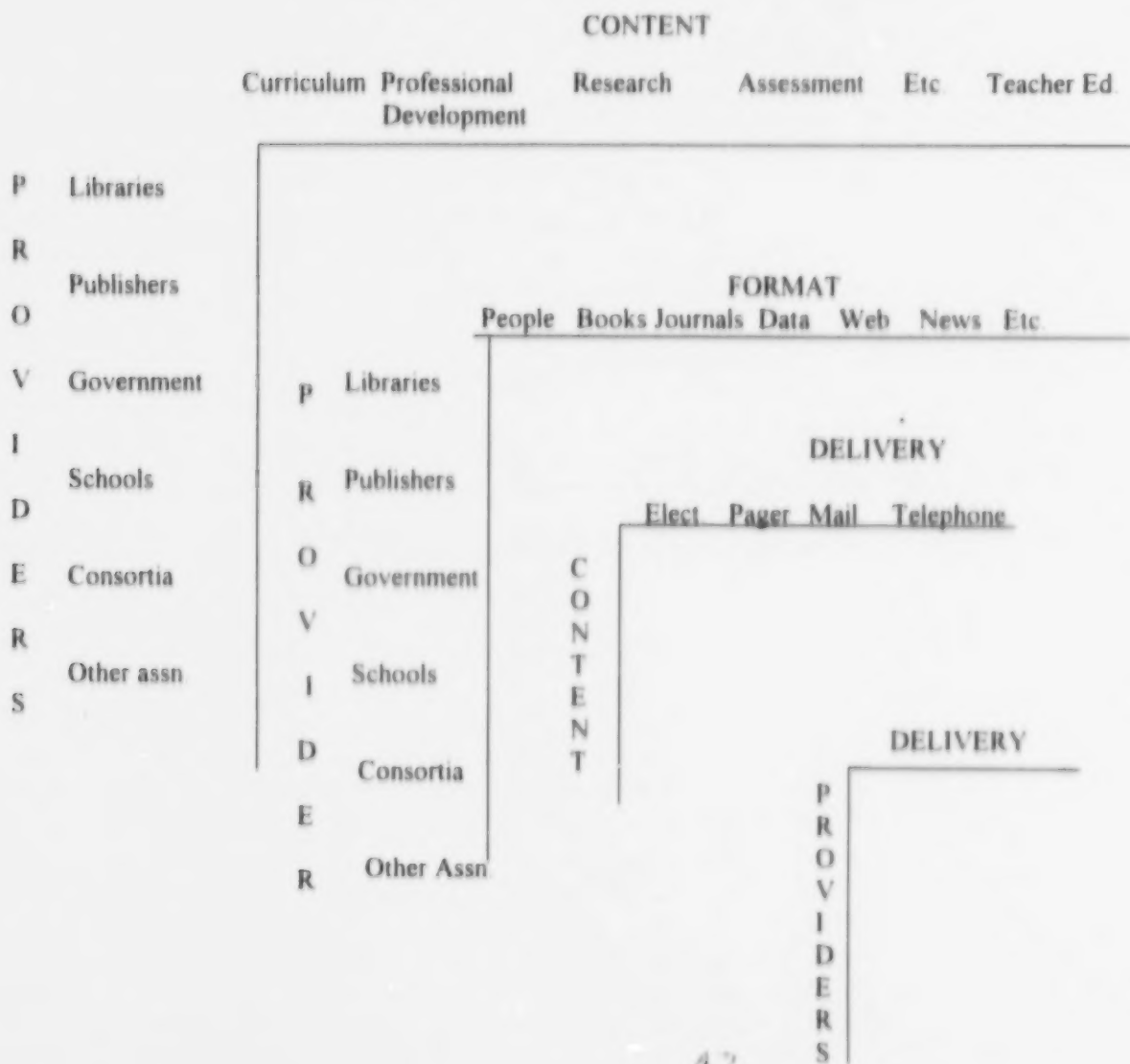
SESSION IV: EDUCATION INFORMATION/ YELLOW Flipcharts

What is a provider?

Typology needed (publishers, librarians, associations)

First What is information?

Create typology then . . . match providers with information typology



Methods/Procedures

1. Match providers against typology (create list)
2. Conference attendees.
3. ERIC clearing houses, etc.
4. Surveys.
5. Log analysis.

Next Steps

Identify typologies
Key players
Needed resources
Criteria for inclusion

Methods/procedures

Management and Role of NLE/Blue Group

The Blue Group identified several next steps for a proposed developmental stage 1, as follows:

- ERIC is a vital player. Potential USEIN information producers include established organizations, teacher associations, users, etc. (see *Access for All*, p. 5, for a list of suggested participants and users of the network).
- A first task of the working group should be to raise awareness, providing many kinds of feedback mechanisms. NLE should convene reactors and respond to their suggestions. This approach would be new and "virtual" and different from NAL.
- "Grand visions" necessitate focusing on the logistics of carrying them out, including establishing a working group and a vision and eliciting stakeholder perspectives and benefits. This effort should promote network participation and a shared infrastructure. Sub-working group topics could include creating standards and protocols, determining needed access, and assessing access availability. Issues for working groups to flesh out include organizational incentives, products, quality assurance, and accountability. Participation benefits and the need for marketing were also discussed.

Session IV: DEVELOPMENT/BLUE Flipcharts

How can NLE best guide the development of USEIN in terms of:

- a 1. Participants/contributors
- b 2. Organizational form
- c 3. Incentives
- d 4. Technological standards
- d 5. Content quality assurance

First steps = "Who/what" → Working Group (s)/Developmental Stage 1

Participants/contributors

- Educational organization + institution
 - #1 ERIC (p. 5, *Access* document)
 - #2 Information producers
 - #3 Mainly established organizations
 - #4 Users — Teacher associations — library/information associations
- Awareness of efforts + some representation at planning stages, participation stages
 - NLE's role to convene — to carry out some response
 - (Not model of NLM or NLA)
 - ? of does network have membership?

Grand visions of "new" network

- e 1. Put together "working group"/lots of opportunity for feedback
- e 2. Establish a vision(s). Get all stakeholders' perspectives and benefits.
3. Organization structure = NLE's different network participation (shared infrastructure, Coalition for Networked Information (CNI))

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Purposes = NLE network* NEW * virtual network → but build and expand on existing networks + information services/products

1. Creates standards/protocols (GEM as example)
- f 2. Access to tools . . . resources
- g 3. Access/availability

Needs (for working group) to consider

1. Organizational incentives
2. Flexibility in developing products within working groups
3. Quality assurance (whose contribution, when take place)

Lab's view/purposes — mission/benefits

1. Provide more efficient/effective access in all "shops"
- h 2. Allow me to be more ? with my products
3. Use partners to build new products? Or provide "better"/more access

Evaluate after this

Need for "marketing"

Need to consider LC's Digital Libraries Project
